



**PARTNER  
SINCE 2019**

Let the experts at Dextara get your business started with Salesforce fast! Our Quick Start option provides our organization with the world's #1 CRM fully customized to meet your unique business needs. Get started in weeks not months. We offer quick start plans for **Service Cloud, Sales Cloud, and Marketing Cloud Account Engagement (Formerly Pardot).**

### Service Cloud Quick Start Services Summary



#### Project Management

- User Management
- Permissions (Profile, Role, Group, Permission Sets)



#### Case Routing

- Import Cases from Web, Phone, or Email
- Design Case Assignment /Routing Process



#### Reports & Dashboards

- Configure up to three (3) Reports & one (1) Dashboard



#### Platform Setup

- User Setup
- Security and Profiles
- Organization Setup



#### Case Management

- Setup of three (3) Customer Service Processes (Cases)
- Setup Service Console, Milestones and List Views



#### Data Migration

- Advise on Data Prep
- Import Client provide Data Files



#### Roll Out & Go-Live

- User Testing
- Training
- Post Go-Live Support



#### Account & Contact Management

- Configure up to three (3) list views
- Configure Account and Contact Lightning Pages
- Update to Support Case Management

### Who We Are

**5/5**

Salesforce  
AppExchange  
Rating

**3+**

Years as a  
Salesforce Partner

**180+**

Certified  
Salesforce Experts

**70+**

Projects  
Completed

**40+**

Global  
Clients

### CONTACT US

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